



Confederation of Indian Industry  
Southern Region



# Dakshin

South India Media &  
Entertainment Summit

*Culturally Rooted. Creatively Global.*

9 - 10 APRIL 2022  
CHENNAI TRADE CENTRE  
CHENNAI



The Confederation of Indian Industry (CII) Southern Region organized the maiden edition of **CII Dakshin 2022 - South India Media & Entertainment Summit** from 09 - 10 April 2022 at the Chennai Trade Centre, Chennai. The theme of the event was Culturally Rooted, Creatively Global.

The objective of the summit was to bring together stakeholders from the Media & Entertainment sector to share and learn from best practices, celebrate achievements, advance knowledge, identify opportunities and network with peers for resurgence and progression of the media and entertainment industry in South India.

The Media and Entertainment industry has shown immense resilience and has bounced back post the pandemic. Currently valued at \$27 Billion, the industry is witnessing strong growth tailwinds and is expected to grow to be a \$55-70 Billion Industry by the year 2030.

## Disruption

The pandemic disrupted and transformed the consumption habits for content - both at home and outside. Some of these emerging trends are expected to have long term implications for the industry. The expectations are:

- Digital trend will intensify, creating demand for regional content
- OTT adoption will continue to rise with the emergence of new business models that are better suited to the new reality

With the onset of the pandemic, the streaming and digital media industries have experienced a massive boom. With increased internet penetration, smartphone availability, and higher per capita income, this sector is expected to grow at a CAGR of 25%.



### South Leads, TV Rules

South India is already playing a significant role by contributing close to 30% of India's Media & Entertainment (M&E) revenues with the current growth pegged at a CAGR of 15%. Of this, the television sector is the largest in the M&E sector, accounting for more than 35% of the total M&E market. The television platform has evolved over time in response to consumer preferences.

It has firmly established itself as the most powerful medium of mass communication, ensuring its continued presence and potential for relevance in the face of advanced technological developments.

The M&E industry's revenue streams are primarily comprised of advertisements and subscriptions. Southern films have performed exceptionally well on OTT platforms and they are among the most watched films in Indian cinema. Rising social media penetration has also aided the sector's growth.

With the upcoming introduction of the Metaverse, this sector is expected to show the most promising growth.

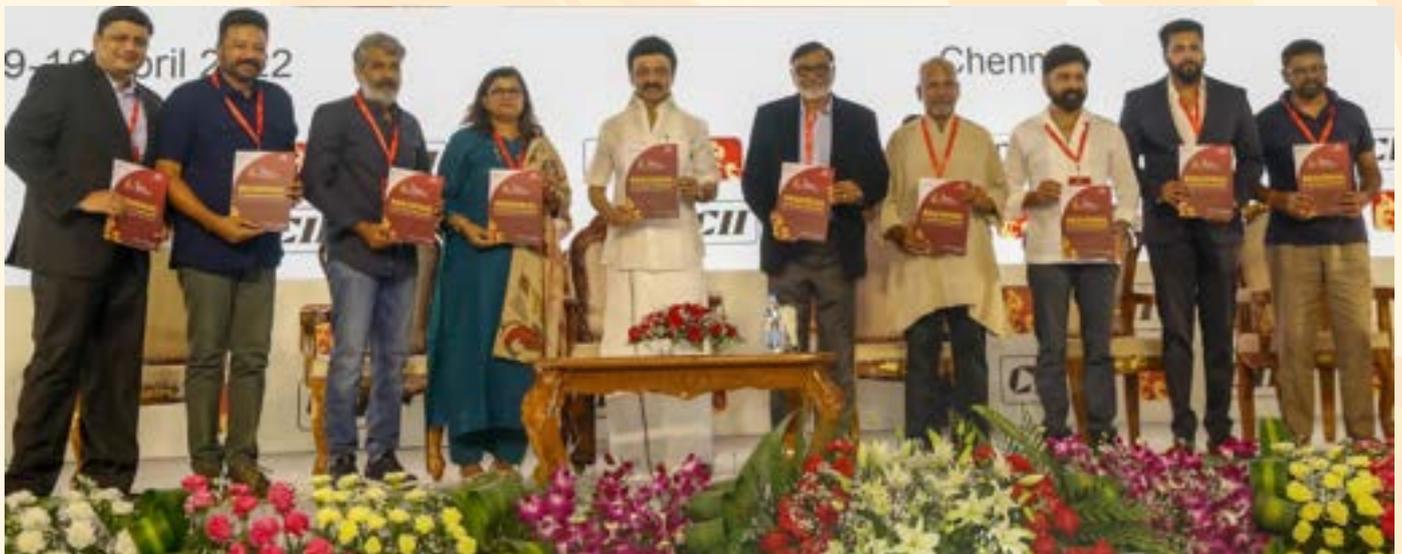
### Sunrise Sector

AVGC is the fastest growing sector in the South Indian M&E industry, with a CAGR of 30%. It is expected to account for up to 10% of the overall M&E sector by 2030. Various government policies have boosted the industry, allowing it to navigate the pandemic's stringent constraints. Increased digitization ensures that demand for AVGC products rises.

However, rising market demand must be met with additional skill development, which necessitates more focused initiatives.

The South Indian film industry produces the majority of the country's film releases. More than half of the films released in the last year were in one of the four south Indian languages. The South Indian film industry has also produced some of the most successful box office hits in recent years.

Furthermore, the southern region has a rich legacy of leadership and pioneering entrepreneurship in the M&E sector spanning over several decades as over 50% of the films produced each year in India are from the South.





## Inaugural Session - TN Government supports the Media Film Industry

The Hon'ble Chief Minister of Tamil Nadu, Thiru M K Stalin in his inaugural address at the maiden edition of the "CII Dakshin 2022 – South India Media & Entertainment Summit" stated the Tamil Nadu Government remains committed to supporting the media and film entertainment industry and further assured the cinema industry, the Government will provide the necessary infrastructure needed for the growth of the industry.

The Hon'ble Chief Minister in his address urged movie directors to keep in mind youngsters are influenced heavily watching movies and social messages highlighting the menace of drugs and tobacco can be incorporated in their dialogues. It is also heartening to note, post the pandemic and lifting of curbs, theatres in Tamil Nadu are getting back to normalcy with lakhs of members from the media industry being employed once again.

Thiru M K Stalin released the CII Southern Region report "Regional is the New National" – Way Forward for the South Indian Media & Entertainment Industry in the summit.

Ms Suchitra Kella, Chairperson, CII Southern Region in her welcome remarks mentioned, the M&E industry is offering tremendous opportunities to excel in almost every vertical and has bounced back to pre-COVID levels making the Indian M&E industry grow at a much faster rate compared to the global average and the numbers speak for itself.

Mr T G Thygarajan, Chairman CII Dakshin 2022 & Managing Partner, Sathya Jyothi Films pointed out, this is the 1st edition of the CII Dakshin South India Media & Entertainment Summit with the theme Culturally Rooted, Creatively Global.

South India is expected to achieve more than half of the \$100 Billion Indian M&E's ambitious goal set for 2030. Despite the many challenges, the industry is confident and optimistic about embarking on a new growth path reaching out to consumers while adapting to consumers technological demands.

The two-day summit hosted 12 panel discussions, a fire side chat and was presided by over 50 speakers from the media and film fraternity.





“Half of the films released in the last year were in one of the four south Indian languages and have produced some of the most successful box office hits in the recent past. There has been a significant impact in the theatre industry as viewers preferred OTT platforms to theatre due to COVID-19, expectations are once again high keeping in mind blockbuster movies are being released in theatres compared to OTT.”

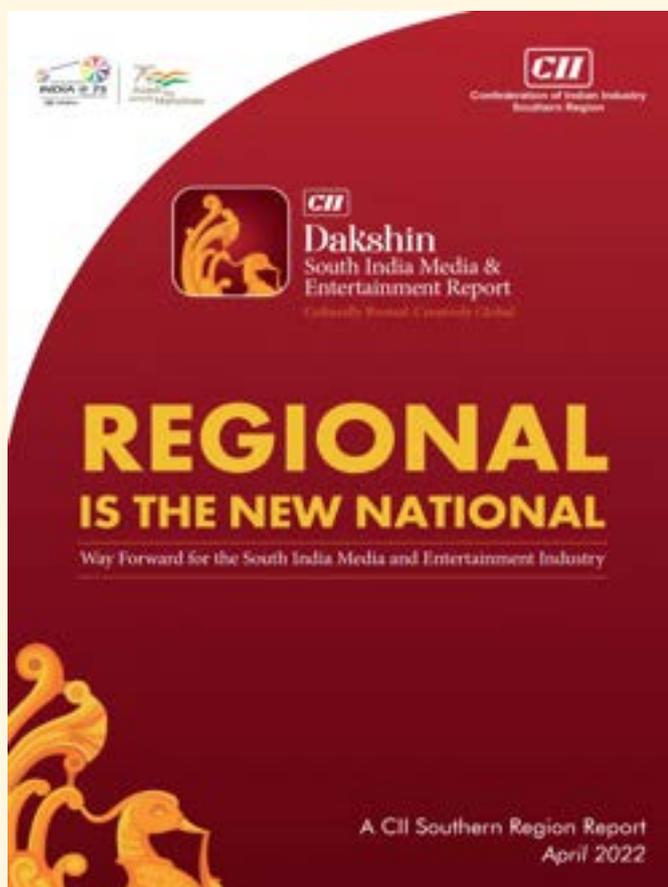
Day One of the summit had panel discussions on:

- South Side Story: How South Indian Cinema can set an example for pan-India films
- Creating Worlds: The Future of Media & Entertainment through AVGC
- Doing the Right Thing: Inclusion and Gender Diversity in the M&E Industry
- Fast & Furious: How Social Media Changed the Industry
- Reinventing Print Media for the 21st century
- Tech Startups Disrupting the Industry.

Day Two of the summit had panel discussions on:

- Megahits on Micro Budgets: The Making of Small Budget Films
- The Home Box Office: Challenges and Opportunities faced by TV
- Creating Content for Millennials
- OTT 2.0: The Next Big Boom
- The Magic of Big Screen: How are Theatres Retaining their Edge?
- Moneyball: Content Monetization & Policy

A fireside chat between Mr Mani Rathnam and Mr Gowtham Vasudev Menon just before the valedictory session had the audience spell bound.





## Day 1

# Panel Discussion - 1 : South Side Story: How South Indian Cinema can set an example for pan-India films

There is an overall appeal for South Indian films across India and the globe as was witnessed with the launch of Bahubali, KGF, RRR and Pushpa to name just a few. As of March 2021, three of the top ten highest-grossing Indian films were from South India.

In a panel discussion, Mr Mani Ratnam, Mr SS Rajamouli and Mr BSukumar, Director, Screenwriter & Producer spoke about this topic at length.

### Key Discussion Points:

- No one should start making a movie with the sole idea to make it as a pan Indian film. Just make a movie that connects with the audience. The rest will follow automatically.
- There is a misconception that a big budget movie when dubbed in four or five regional languages becomes a pan Indian film. It is not so. For instance, the movie Roja connected with both the north and south Indian movie goers making it a very successful pan Indian film.
- Also, while writing a movie script, don't think of the story keeping in mind it should be made as pan Indian film. Once the story is complete, evaluate, see the potential and then work towards the outcome.
- The traditional way of marketing films are over. Spending crores of rupees on posters and billboards is a wasted effort. Today, it is all about social media and how one connects with the audience. This connect is also changing every minute and one should be on top of things.
- Gen Z are now creating memes and it is the best medium to use for promoting movies. It is not only memes, but we should learn how to be more creative learning from them. This generation today has a tremendous advantage by learning on their own. They can discover themselves. Today's meme creators are tomorrow's movie makers.
- Learn to understand what the audience wants and deliver that. There is a huge segment that loves south Indian movies as there is a dearth of content especially for the north Indian audience.
- Focus on the film sets, learn, and enjoy the art of movie making. You will eventually learn the nuances of movie making rather than studying how to make a movie in any university.
- Big or small films does not matter, what matters is good films. Story telling is very important and the more we tap into our culture, the more we will go global.





## Panel Session – 2 : Creating Worlds: The Future of Media & Entertainment through AVGC

Gaming is no more a geek's game but is now a billion-dollar industry. It is now an official event at the Asian games too. Films are now dependent on visual effects to a large extent in India as the audience understands and expects VFX to play a key role in filmmaking.

The AVGC industry in South India has shown a steady growth in recent years and has the potential to become the torch bearer of 'Create in India' & 'Brand India'.

AVGC is the fastest growing sector in the South Indian M&E industry, with a CAGR of 30%. It is expected to account for up to 10% of the overall M&E sector by 2030.

Presently, India has about 300 animation companies, 40 VFX and 85 game development studios with more than 15,000 professionals churning out world-class content for the entire world, and South India accounts for a major share of this pie as the region leads the AVGC sector in terms of number of companies, studios, startups and talent.

Various government policies have also boosted the industry, allowing it to navigate the pandemic's stringent constraints.

The effective implementation of AVGC Policies in states like Telangana and Karnataka and the setting up of the AVGC council to help the industry find a way forward is the first step towards increasing India's market share in the global arena.

Increased digitization ensures that demand for AVGC products rises. However, rising market demand must be met with additional skill development, which necessitates more focused initiatives.

### Key Discussion Points:

- The pandemic has actually helped this industry to discover what one is capable of producing and delivering in terms of content.
- The new normal is constantly seeking out new ways to monetize and storytelling producers utilizing phone and the Internet as their mediums.





- Content creation is redefined with digital production following a new approach to platforms defining script to screen strategy.
- The world of film making has evolved. Image making is now what film making used to be.
- Utilizing and leveraging technology to one's advantage in this age of innovators.
- South India holds tremendous potential than its current 36% of Industry's revenues. It can be increased to 50% comfortably.
- South Indian States are pioneers when it comes to hardware and software applications as compared to Bollywood. Newer technologies have always been incorporated first in Tamil and Telugu movies before it is adopted into Hindi cinema.
- South India can be made the leader when it comes to virtual production in the Indian ecosystem.
- The most powerful computing device ever made in the last 15 years is the game console.
- \$250 Mn of VC funds have been invested in gaming companies in South India in the past two years and the expectations of more funding is imminent.
- The AVGC should be recognized as an infrastructure industry
- Talent to scale is to be addressed as the demand for orders is already there. India contributes 1% of the world market and there is potential to double this.





## Panel Discussion – 3 : Doing the Right Thing: Inclusion and Gender Diversity in the M&E Industry

12% of the world's 100 highest grossing movies in 2021 were directed by women, down from 16% in 2020.

In the nearly eight decades of India's national film awards, only two movies by women have been named best picture.

Over the last few years, terms like inclusion riders have been common, to improve opportunities and working conditions for all genders in the industry.

While progress continues to be made, more work remains.

### Key Discussion Points

- There are many women entrepreneurs in the field of media and entertainment. They are taking charge of their work and lives, especially after the digital and OTT platforms.
- Women have taken charge not only as Directors but in the middle and senior management.
- They can fit into any industry with ease because they are brilliant when it comes to multi-tasking.
- As an artiste, being emotional, empathetic and sensitive is women's biggest strengths and in particular to this industry.





## Panel Discussion – 4 : Fast & Furious: How Social Media Changed the Industry

In 2010, the number of Facebook users in India was a mere 80 lakhs. Today, it is upwards of 32 crores. Instagram crossed 23 crores and Twitter 2.3 crores. There are about 800 million broadband Internet users, over 600 million smartphone users who watch five hours of video content a day compared to the global average of four hours a day.

South India has the highest percentage of WhatsApp, Facebook, Twitter and YouTube users, followed closely by north India. Madan Gowri, Ahmed Meeran, Sonu Venugopal, Chef Suresh Pillai and Gurubaai are some of the popular names from South on social media. They all produce localised content catering to a niche-yet-sizeable fan base that is expanding swiftly.

Kerala registered the highest internet penetration among the southern states at around 56%, followed by 47% in Tamil Nadu, 39% in Karnataka and 31% in both Telangana and AP.

### Key Discussion Points

- Digital can never replace cinema. It can only support and compliment cinema. Though there is a possibility that digital media can replace television as a medium.
- Earlier, a household had one television but today, there are five screens (mobiles) in every household.
- The Tamil and Telugu cinema industry is growing to a large extent because of social media. Every celebrity is joining the social media bandwagon and getting to be a bigger version of themselves.
- Youtube and social media has created more stars. Today, social media has phenomenal reach and any star can be interviewed and published with ease compared to print or television.





- There is a low acceptance for pay per view subscription models and advertisements on social media platforms compared to expecting everything free.
- Social media is breaking the bubble and is the only platform that allows interactions on a real time basis, compared to cinema or television where consumers only consume content without any interactions.
- 30% of collections come in the Day 1 of a movie release. One has to now look at the presales of

tickets like what RRR did. Incidentally, social media plays a very important role in collections.

- The common man today prefers to wait and see a new release after two weeks on OTT platform whereas, 90% of youth who go to theatres are in the age group of 18 to 28 years.
- As one gains popularity in social media, with appreciation comes a fair share of trolls who will hate you. One has to be thick skinned and generally ignore this category.





## Panel Session – 5 : Reinventing Print Media for the 21st century

Despite the pandemic taking a toll and advertisers opting the online medium, the print media has not buckled down under pressure.

This century old industry is fast gaining lost ground and reinventing itself to cater to the Gen Z apart from making every effort to retain its current readers.

Shrugging off the many obituaries the print media has faced the Key discussions points were:

- Industry experts were quick to point Print media still exists and will continue to for the next decade despite many commenting about its slow decline and popularity.
- Publishing houses today are adapting to deliver news through any medium and every media

firm has adopted digital formats to deliver news and retain their subscriber base.

- 60% of the sales generated by the top three regional newspaper groups in Tamil Nadu came via the subscription model.
- Journalists today have also adopted to write in multiple formats instead of a single format.
- US publishers sold 825 million print books in 2021. This is an increase of 9% from 2020.
- Print media faces challenges from the Web, gaming and streaming as it continues to rise.
- Print media still and will continue to play an important role in shaping the national narrative as the most trusted media.





## Panel Discussion - 6 : Tech Startups Disrupting the Industry

Startups in the entertainment industry is betting on the future and are the future. Some startup's push technology further, some bring in better ways of matching talent to those who need it. Some make the movie-watching experience better, while some ensure making movies can be easier and some go beyond these. These startups continue to attract eyeballs and financing and more. Let's explore.

### Key Discussion Points:

- Start ups and innovations have taken media to the next level. If today it is OTT, 15 years back it was digital cinema and prior to that, Analog.
- Hoot Audio Social Media : India's first audio social media platform. It is an app that rehumanizes social media with an authentic voice and is currently available in all regional and International languages too.
- Another first to Hoot's credit : World's first 60 seconds news feed on demand. Independent agencies can create their own news feed and human to human interaction is also possible.
- Oracle Movies : Helps producers on how to market a film assisting them in protecting the IP rights of the movie as it is very important and ensuring producers for the next 3 generations (60 years) can earn royalty month after month using blockchain technology and NFT.
- Ormax Media: India's first specialized insights consulting firm since 2008 has developed 20 proprietary tools in content marketing and strategy analytics for the media industry.
- Over the past 12 odd years, Ormax has gathered rich media trends and habits, tied up with over 100 plus regional, national and international brands and works primarily on content testing & campaign tracking leading to business forecasts before the release of a





movie. Based on their findings, film makers can change the content, target the right target audience and distribution can be enhanced ensuring higher box office revenues.

- Diginoor: India's first movie NFT platform helps producers monetize every shot of a movie. Further, by using NFT and smart contracts, artistes can safeguard their interests in royalties too.
- RAYS3D: With zero publicity, this company converted a 40 year old movie : Sholay and generated 15 crore revenues. They guarantee 30 % more revenues out of the box office collections with 100 % immersive content. Incidentally, 3D gives the viewer an immersive experience in theatres.





## Day 2

### Panel Session - 1 : Megahits on Micro Budgets: The Making of Small Budget Films

Box office success often sees factors like big names, cutting edge visual effects, and massive marketing campaigns come together. But the audience is often agnostic to names if they are provided with some evergreen elements: performances and plots.

For example, the last four Oscar Best Picture winners were all made on less than \$30 million; two of them went on to make more than \$200 million at the box office. What are the factors that make a film successful irrespective of the money poured into it? What will the audience demand? Is word-of-mouth as effective as a social media campaign?

Today, 80% of the films are small budget movies. Over 200 films are produced in a year with 160 films produced with a budget that is less than Rs. 5 crore and not more than 5 movies are picked up by OTT platforms.

#### Key Discussion Points

- Producers prefer to produce a movie with the right budget, and the right star. There is no concept of small budget or a big budget.
- For a movie to be successful : script, price, release, and distribution is crucial.
- One has to learn how to work with limited funds. The devil lies in the detail. It is recommended that one works backwards, break every rupee to understand where it is being spent and only then commence making of the movie.
- First time film makers need to be disciplined and understand line production. It is all about execution and micromanagement instead of claiming they are not the experts.





## Panel Session - 2 : The Home Box Office: Challenges and Opportunities for TV

Cable-cutting is a phrase that has become familiar in western countries. It is now seen in urban India also. An estimated 4.5 to 5 million TV connections were dropped during 2020, driven by costs and availability of good internet and streaming content.

It is estimated that around 680 million Indians stream content in around the 40 different platforms available. That number is likely to grow. However, therein also lies an opportunity; audiences are driven towards easy-to-access content, not the internet. And a large portion of India still finds time to watch TV, giving an immediately accessible base to build on. The television sector is one of the key pillars to South India's creative economy. It is still the cheapest form of entertainment, and the widest form of entertainment across genres.

Television continues to occupy major 45% of the South India Media & Entertainment market share. By

the end of 2022, the South Indian TV segment of the Media & Entertainment industry market is expected to be worth Rs 33,100 crore, with a 10% CAGR.

Subscription and advertising revenues are evenly growing and there are visible signs of advertising in recent quarters. South India is home to 179 (or 29%) of India's 613 TV channels, accounting for around 35% of the country's total viewership. Tamil language channels have the most TV channels (65), followed by Telugu language channels (50), Kannada language channels (36), and Malayalam language (28).

### Key Discussion Points

- In South India, subscriptions continue to be the most lucrative source of revenue for television, followed by advertising and programming.
- According to industry estimates, TV stations in South India earned Rs 25,200 crore in





subscriptions, Rs 9,360 crore in advertising, and Rs 1,440 crore in programming in 2019.

- Due to the pandemic, these figures fell in 2020 to Rs 20,300 crore (subscriptions), Rs 7,540 crore (advertising), and Rs 1,160 crore (content-based revenue). With a market share of 35%, Tamil Nadu is the largest TV subscription market in South India, followed by Andhra Pradesh and Telangana (32%), Karnataka (21%), and Kerala (12%).
- When it comes to the percentage of South Indian states in TV ad income, Tamil Nadu leads the pack.

- Television is a great business to be in. Consumers now have incredible choices and has the potential to compete with OTT platforms.
- Despite television channels offering full support, it is the producer who is solely responsible. This should evolve with everyone sharing responsibility equally.
- As times change, content too changes and we need support from television channels to create the magic that producers are confident of delivering.





## Panel Session - 3 : Creating Content for Millennials

The millennial generation (ages 25 to 41) are at the right moment for consuming content. As the first internet-connected generation, their life experiences and travel exposure keep them as an in-between generation. Their experiences of having lived through phenomenal societal and cultural change also mean their expectations of stories differ greatly. India alone has around 400 million millennials.

### Key Discussion Points

- Every era has its own story to say. Be it social, political or a social – political genre, as a storyteller, one should express it based on one's experience.
- Cinema was once a medium of escapism. Today, it is all about questioning or accepting the existing norm.
- We all grew up hearing stories and then we start telling stories to others. It is an ongoing process that one has to enjoy.
- One should make sure the storyteller should satisfy the story listener within oneself.
- Stories have not changed in cinema. It is only the treatment that has changed for the millennials.





## Panel Session - 4 : OTT 2.0: The Next Big Boom

The overall streaming world in India has a potential of reaching 600 billion subscribers from the current 600 million subscribers in the coming decades and it is a great time to be a content creator and a consumer. Indians now prefer quality content especially post lockdown and OTT platforms such as Amazon Prime Video, India and Netflix are working towards delivering the same.

As per CII data, the OTT market in India alone is expected to be worth around \$13-15 billion by 2030. The number of OTT subscribers worldwide is pegged at 300 crore. This is expected to jump to 400 crore. The US alone has over 33 crore OTT subscribers while India has 8 crore subscribers. The worldwide market value stands at Rs. 10 lakh crore and is growing 20 percent Y-O-Y.

Subscribers in India is expected to grow to 25 crore by 2025 from the current 8 crore with the Indian OTT market valued at about Rs 15,000 crore.

### Key Discussion Points:

- India is a heterogeneous market and OTT platforms are delivering content to consumers in multiple languages both in movies and series.
- Data shows 50% of consumption from regional languages come from viewers outside of their states.
- In the last two years, Netflix is investing in more local content with the journey from Hindi to regional languages especially south based languages moving at a fast pace.
- The streaming platform is at the start of a massive revolution and the platform is deeply excited about the quantity and quality of content increasing in the coming years.





- Audiences are now demanding and are no more captive by nature.
- India is poised for higher growth in the coming years as investments in original content is expected to cross Rs. 5,000 crore. This investment is spread over 40 plus OTT players and 10+ music streaming apps.
- One in 5 Indians consume OTT content at least once a month spending on an average 90 minutes per day consuming OTT content.
- Regional is the new national. Nearly 59% of the films on OTT showcased was regional films. Over 47 percent of the originals that were showcased were regional.
- Three out of 10 subscribers in Indian watched Non-Hindi and Non-English content.
- Data shows India is the world's fastest growing OTT market with Rs. 5300 crore plus revenues in 2021. This revenue is expected to grow with smart TV penetration.
- Over 100 films have been released Direct to OTT in 2021 and over 2500 hours of original content produced in 2021.
- Regional entertainment in India is 90% of its digital population combined with regional and foreign language content (with subtitles). The Indian regional language user base is over 50 crore and growing rapidly.





## Panel Discussion - 5 : The Magic of Big Screen: How are Theatres Retaining their Edge?

The South Indian film industry produces the majority of the country's film releases. More than half of the films released in the last year is from South. Post the pandemic, things have returned to normal with more frequent theatrical releases. There is a gradual shift from the OTT platform to theatres once again leading to crowded theatres as more big budget movies are being released.

In terms of screen density, the southern states account for 47% of the country's estimated 8,000 cinema screens. There are approximately 1700 screens in Andhra Pradesh and Telangana, 1100 in Tamil Nadu, 900 in Karnataka, and 700 in Kerala.

### Key Discussion Points

- Theatres are still relevant in the movie and entertainment industry despite many OTT platforms gaining viewers.
- A typical Indian family prefers to watch movies in a theatre over a weekend combining their evening with eating and shopping. This trend cannot change as it is a part of their lifestyle.
- Crowds prefer and are willing to travel to watch a movie on the big screen.
- It is suggested that screens should be at least 60 feet with comfortable seats, surround sound, effects etc.,
- One should have an overall immersive experience to make a movie thoroughly enjoyable.
- There is a demand for large screens and people are willing to pay the price for the experience.
- There are no seats to sell on Friday, Saturday and Sunday which shows large screens are the future.
- Today, people want to experience music, visuals and be immersed totally while watching a movie.
- Feel good movies are doing well and the public are no more interested to watch sad movies post the pandemic.
- Good content, good creatives and good music will strike the right note for moviegoers.
- Nearly 72% of Indians between ages 17-34 are open to seeing movies in theatres. The current generation are aware of the latest technologies and expect it in theatres.





## Panel Discussion – 6 : Moneyball: Content Monetization & Policy

Even as movies with good content break box office records, monetizing it successfully remains the key to long term prosperity. Legacy players are being snapped up by hungry OTT players, but the larger question remains as to how each player can eke out the maximum for their existing content.

### Key Discussion Points

- Quality of content will only save oneself from recovering the investment made into producing a movie.
  - There should not be a financial pressure while making a movie as it can snowball into compromising crucial decisions.
  - Understand if the buyer is interested as there are limited number of screens, television channels and OTT platforms.
  - Business opportunity is there for only 120 films whereas, hundreds of movies are being produced every year.
  - Film producing is easy nowadays but, there are not many avenues one can exploit content.
- Producers get desperate to sell the movie to recover their investments.
- Movies should not be treated as a seasonal product, for example, based on political events that may be currently trending. It should be based on content, for good content is timeless.
  - Make good content and with zero desperation it will lead to tremendous success.
  - How to pitch a movie is crucial for a producer to get his movie distributed.
  - For a producer, money saved is money earned. Shooting at locations in different countries can assist them in saving money. Producers should look at multi various tools as the cost of saving in a shoot is a direct increase in profits.
  - Many countries across the world offers rebate and one should pick and choose carefully to reduce shooting costs. To cite an example, by shooting in the UK, a producer can almost recover 100 percent of the shooting cost.





## Fireside Chat

A Fireside chat with two Industry stalwarts, **Mr Gautham Vasudev Menon**, Director, Screenwriter, Producer & Actor and **Mr Mani Ratnam**, Director, Screenwriter & Producer was another highlight of this two-day event.

The conversations touched upon **Mr Mani Ratnam** as a person, his love for tennis and architecture and his award winning and pathbreaking movies such as Roja, Bombay and Dil Se and his latest movie - Ponniyan Selvan 1 & 2 that is bound to break world records in the movie industry.

Complimenting **Mani Ratnam (MR)**, **Gautham Vasudev Menon (GVM)** said, "You have been my inspiration and I grew up wanting to be you. I see Steven Spielberg and yourselves as equals."

Excerpts of the one-hour conversation are below:

**GVM: Why does a director make a film?**

**MR:** One directs a film as it has a bit of everything. For every good film one watches, one tends to do something better the next time. I firmly believe film making is elusive and for me, every movie that I make, it is like making a movie for the first time.

**GVM: Every movie of yours has exceptionally good music. Can you make a movie without songs?**



**MR:** Though it is possible to make a movie without songs and music, I feel music and films are married. It is like writing a script. Every pause in a movie is filled with music and it adds up to making a film. Cinema in Tamil and music are born for each other. We cannot make do without each other.

**GVM: Do you prefer to write the script before you pitch it to an actor or you write a script keeping in mind an actor?**

**MR:** The movie Nayagan was scripted keeping in mind Kamal (Mr Kamal Hassan). I prefer to write enough content initially to narrate to an actor and then take it forward. I do not wait to complete the script and then pitch to an actor.

**GVM: Do you get tensed once your movie is complete not knowing the outcome?**

**MR:** One should be tensed while shooting the movie. Once the shoot is complete, what can one do. One can as well sit back and finish post-production and await its release.

**GVM: Does reviews bother you?**

**MR:** I stopped going to theatres nearly 2 odd decades back. I am not bothered about reviews anymore. Once the film is complete and ready for release, I do not watch them.

**GVM: From making movies in films to digital, how has the journey been?**

**MR:** I welcome making films on digital. Earlier, movies were shot on films (negatives) and after every two shows, the negatives would develop scratches which would be quite a bother. There were many other challenges when it came to making movies in this format be it scratches to lights to projectors and film rolls etc., With Digital, even the visuals and sound is just unbelievable.



**GVM:** Do you micromanage your actors on the sets or allow them to be who they are?

**MR:** Do you micromanage your actor's?

**GVM:** No. I give them the freedom to act as they like after I narrate the script and what I have in mind. I get the best out of my actors.

**MR:** It is the same for me. I prefer my actors to get into the skin of the character and play their role. An actor has to invest in the character and my job is to bring that out. Otherwise, I am not doing my job. For me, more importantly, it is the staging of the scene.

**GVM:** The rage and talk of the town is pan India films? Would you make a pan India film?

**MR:** Pan India films has been in vogue since the 1950s. Chandralekha, the blockbuster mega hit film produced by SS Vasam was one such movie. Mr. Vasam and Mr. Rajamouli (makers of RRR and Bahubali) for instance have the ability and are confident to make a film on those levels. It is an assurance that they inherit that in turn is passed on to the audiences.

Till a few years back, South India movie goers would watch Hindi movies. Now, it is their turn to watch ours.

**GVM:** When do you get the time to make a movie?

**MR:** Ideas are always there. One who is passionate about their job will never find a dearth of ideas. For me, the best time to think of the next movie is when I am in post-production. There is nothing more that I can do, so my slate is clean. I am open to thinking something new. It is a process that I allow to make it happen and then if it's exciting enough, I start working on it.

**GVM:** How has your journey been from your first movie to Ponniyan Selvan 1 & 2?

**MR:** Right from the first movie of mine till the last movie, I learn on the job. I still learn and it is a constant struggle. No one is an expert. For me, it is my first shot that is crucial. Post that, I am comfortable and enjoy the art of movie making. I am happy to do films and nothing else. It is a boon to have a job that you love and also earn money.

Money is just a by product and it is not the main criteria. I tell myself to make just one more movie after I complete one.

**GVM:** Lastly, what is your advise to the movie fraternity who is sitting here with us?

**MR:** I advise the future film makers to believe in yourself and what is right. Push yourself one step more and that will make the difference.





# Valedictory Session

The Media and Entertainment industry is one of the fastest growing markets in the world and post the signing of treaties with 15 countries for co-producing films with Indian actors, the expectations are high for the industry to be more visible in the global map and compete with Hollywood. The South Indian film industry market is expected to be worth of Rs. 6050 crore with a CAGR of 13%. The South Indian M&E sector has also benefited greatly from a favorable policy environment, which has allowed the industry to move forward even during the pandemic.

## Key Discussion Points

Dr L Murugan:

- India is one of the fastest growing media and entertainment industries in the world and produces the highest number of films in the World. The M&E industry employs millions across India and the central government acknowledges their valuable contributions and commits to support this industry. Today, viewers have a variety of entertainment to choose from, be it the silver screen, OTT,

gaming, and animation which is beneficial for the industry as a whole.

- The central government has announced key policy decisions to support the M&E industry:
  - a) Signed treaties with 15 countries to offer and co-produce movies.
  - b) Introduced a single window clearance and a special portal to assist international movies being shot in India.
- India is emerging as a major destination for hi-end services like animation, VFX, editing, dubbing and sub-titling. Many international movies like Jungle Book, Life of Pi etc., have availed the services of Indian companies in this regard.
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- The Icon' award was presented to Dr A R Rahman, Music Composer, Singer, Lyricist & Producer for his immeasurable contribution towards Indian Cinema by Dr L Murugan.
- Dr A R Rahman as a part of his speech spoke about one must cast people with color, empower and give them character which in turn would give them dignity. As South Indians, what we need to do is cast our people with power. Make them empowering. This is definitely something that we can do.
- We should also represent our culture in the most glorified way. Imagination should not be just for South India but it should be for our rich culture. Our movies should lead in thoughts and the story. We should show the world our culture and what we have for it is easy to divide people. We should now unite and show the world our unity.
- Mr M Nassar, President, Nadigar Sangam: The words talent and passion are frequently used when it comes to M&E industry. I would request everyone to also add professional and professionalism into the vocabulary of this industry.
- A request to reduce the TDS from the current 10% to 2% can help the 900 small budget films being produced every year.
- Mr RK Selvamani, President Film Employees Federation of South India (FEFSI): We have risen from the ashes post the pandemic like the phoenix. The challenges we currently face are members of the film fraternity are being denied benefits by the Government as there is a lack of clarity on whether the M&E industry enjoys an Industry status or comes under the unorganized sector.
- Mr Satyakam Arya, Chairman, CII Tamil Nadu: The South Indian film industry market is expected to be worth Rs. 6050 crore with a CAGR of 13%. The South Indian M&E sector has also benefited greatly from a favourable policy environment, which has allowed the industry to move forward even during the pandemic.
- Mr T G Thyagarajan, Chairman, CII Dakshin & Managing Partner, Sathya Jyothi Films in his closing speech announced Dakshin- South India Media & Entertainment Summit will be a yearly event which was appreciated by all.





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## Confederation of Indian Industry

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering Industry, Government and civil society, through advisory and consultative processes.

CII is a non-government, not-for-profit, industry-led and industry-managed organization, with over 9000 members from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 300,000 enterprises from 294 national and regional sectoral industry bodies.

For more than 125 years, CII has been engaged in shaping India's development journey and works proactively on transforming Indian Industry's engagement in national development. CII charts change by working closely with Government on policy issues, interfacing with thought leaders, and enhancing efficiency, competitiveness and business opportunities for industry through a range of specialized services and strategic global linkages. It also provides a platform for consensus-building and networking on key issues.

Extending its agenda beyond business, CII assists industry to identify and execute corporate citizenship programmes. Partnerships with civil society organizations carry forward corporate initiatives for integrated and inclusive development across diverse domains including affirmative action, livelihoods, diversity management, skill development, empowerment of women, and sustainable development, to name a few.

As India marches towards its 75th year of Independence in 2022, CII, with the Theme for 2021-22 as Building India for a New World: Competitiveness, Growth, Sustainability, Technology, rededicates itself to meeting the aspirations of citizens for a morally, economically and technologically advanced country in partnership with the Government, Industry and all stakeholders.

With 62 offices, including 10 Centres of Excellence, in India, and 8 overseas offices in Australia, Egypt, Germany, Indonesia, Singapore, UAE, UK, and USA, as well as institutional partnerships with 394 counterpart organizations in 133 countries, CII serves as a reference point for Indian industry and the international business community.

## Confederation of India Industry

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